QUICK REFERENCE GUIDE

July 25, 2024

Save an Existing Report through a Dashboard

The EPM Data Warehouse offers many existing reports so that you do not need to create new ones from scratch. After you access an existing report, you can customize it and save it.

Find existing reports from the Catalog, a dashboard, or Favorites.

- **Catalog**. The catalog is where the folders, reports, and dashboards reside. It has a folder structure.
- **Dashboard.** A dashboard is a customized collection of reports that are presented as tabbed sheets. These tabs allow an individual or agency to develop and present reports that are accessible in one place.
- **Favorites**. The Favorites dropdown list displays any reports that you marked as a favorite. This tab is located on the top menu of every page.

IMPORTANT! You can save an existing report from the Catalog or Favorites as well as a dashboard. Once you find the existing report from the Catalog or Favorites, follow the same steps outlines here.

There are several dashboards available to most users depending upon assigned roles and security. If you do not have security access to the Subject Area for a report, you cannot see the report on the dashboard.

- 1. In general, most EPM Data Warehouse users can find shared dashboards and reports in the _Statewide and Agency Report Exchange folders from the Dashboards menu.
- 2. Some agencies created their own dashboards. To find these agency-specific dashboards, open the Dashboard menu, look under the agency-specific folders to see what is available to you.
- 3. You can create your own My Dashboard.

Most users of the EPM Data Warehouse do not have administrative roles and permissions to save reports in shared dashboards and folders. You will need to save reports in My Folders.

Reports from the _State-wide shared dashboard are a good place they were created based on agency reporting needs. This Quick Reference Guide lists the steps to find, make edits, and save an existing report through the State-wide shared dashboard. It also describes how to find it in the Catalog, make edits, refresh data, and re save it.

Step 1: Navigate to the Dashboards menu and find the desired existing report

1. Navigate to the EPM Data Warehouse. Open the Dashboards menu and find the desired report.

Navigation Options	Navigation Path
Navigation Collection	Administrative Portal, Data Warehouse, Data Warehouse, Dashboards menu, _Statewide.

2. Select a dashboard. This guide shows the "All Expenditures" dashboard.

MINNESOTA EPM Data Warehouse			Sear	ch All	•		Q Advanced	He
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				Most Rec	ent(EPM Dat	^ a Warehouse	Quick Links - page	2 1)
EPM Data Warehouse Dashboards				My Dashb	oard			
This Dashboard will provide you with navigation links to all State Wide Dashboards. Available Dashboards are listed in alphabetic	cal order.				ReportExcha	inge		
✓ Navigation - ELM				Statewic				
Enterprise Learning Management				-	s Receivable			
Navigation - FSCM				E Account	s Receivable	Certification		
Accounts Payable Accounts Receivable				🔳 All Expe	nditures			

Step 2: Select prompt values, review results, and save it in My Folders

After you select a report, the report page appears. Each shared report has a unique layout depending on the requirements for it.

- 1. On the **Prompts** section of the report page, update any fields as needed. You must enter values in fields marked with an asterisk (*).
 - a. Most dashboards have prompts. A prompt allows you to customize which data is returned in an analysis or report.
 - b. Not all existing reports have prompts. If the report does not have prompts, it will automatically run the report results based on any analysis filters in place.
 - c. Typically, you'll see Budget Period and Agency.
 - d. If you updated the values in any prompts, select **Apply** to run the report.

All Expenditures			Home	Catalog	Favorites 🔻	Dashboards 🔻
Summary Detail						
✓ Navgation						
EPM Data Warehouse Quick Links						
A Prompts						
Select required va	lues from drop-	downs. *	Asterisk deno	tes required	d field.	
* Budget Period	2025	•				
* Agency	G10	•				
* GL Posted Day Dt	Between 07/01/2	2024	07/25/20	24	6	
Appropriation	Select Value	•				
Fin Department	Select Value	•				
Fund	1000 - General	•				
				Apply Res	set 🔻	

- 2. Once you select the Apply button, you may see a "Searching..." load message.
 - a. If the values you selected in the Prompts section are a large dataset, it may take a while to run this report.
 - b. If it doesn't show results in a minute or so, you may need to adjust the prompt values to restrict the data.
 - c. You may see a "No Results" message. This occurs if your prompt values were too restrictive and there was no applicable data.
- 3. The Filters section displays the data sets and data values you selected from the Prompts section.

✓ Filters		
	and and	Budget Period is equal to 2025 LEFT(Agency (L2) Cd, 3) is equal to G10 Fund is equal to 1000 - General Monetary Amt is not equal to / is not in 0 GL Posted Day Dt is between 07/01/2024 and 07/25/2024 or GL Posted Year Num is equal to / is in 0

4. The **Results** section shows the report using the selected parameters from the prompts. It shows the name of the report, the date and time it was run, and any parameter such as the Budget Period and Agency.

esuits Expenditures_Summary All - Expenditures a run: 7/26/2024 7:22:27 AM Budget Period 2025 Agency G10												
Fund	Appropriation (CF3)	Department - Financials	Fact All Expenditures	Department Tree	e - Exp	Appropriation (CF3)						
Fund Fund	Appropriation (CF3) Appropriation	Department - Financials Fin Department	Fact All Expenditures Monetary Amt	Department Tree Approp Dept Id	•		Bdgt Activity					
		•	Monetary Amt	•	•	Bdgt Program	Bdgt Activity G100101 - Accounting Service					
Fund	Appropriation	Fin Department	Monetary Amt 14,734.86	Approp Dept Id	Altmt Dept Id	Bdgt Program G1001 - Statewide Services						

- 5. Review the results on the Results section.
 - a. Update any prompt settings as needed. Select the **Apply** button to update the results.

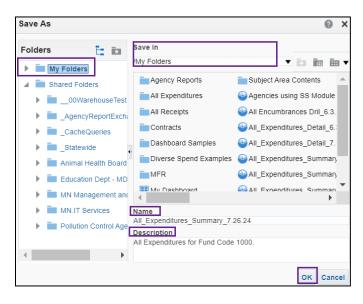
b. When you are ready to save the report and keep the prompt values, go to the bottom of the report page. Select the **Analyze** link. If you select the **Edit** link, it will not save the prompt values and you'll have to enter them again.

Grand Total	265,638.93
	Budget Period is equal to 2025 and LEFT(Agency (L2) Cd, 3) is equal to G10 and Fund is equal to 1000 - General and Monetary Amt is not equal to / is not in 0
	and GL Posted Day Dt is between 07/01/2024 and 07/25/2024 or GL Posted Year Num is equal to / is in 0 Analyze - Edit - Refresh - Print - Export

- 6. The EPM Data Warehouse displays the report in the **Analysis Editor** page.
 - a. To keep your report prompts, select the **Save As** icon at the top right of the page.

All_Expenditures_Summary				Home Cat	alog Favorites 🔻	Dashboards 👻	New 🔻 Op	en 👻 Signed In As	Contragence desce in a
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⊿ Subject Areas 🔍 †↓ 🔻 ≫	Y 9. ⁰ 1320								
FMS - ALL - Expenditures FMS - ALL - Expenditures	✓ Selected Columns								<u>۲</u> ۲
Account	Budget Period Year	Department Tree	- Exp			Fund		Appropriation (CF3)	
Account Entry Type	🚯 1 Budget Period 🥸	2 Agency 🔅	Appropriation (L3) Cd 🔅	Approp Dept Id 🔅	Allotment (L4) Cd 🕸	Fund 🔯	3 Fund Cd 🔅	Appropriation	4 Appropriation Id

- b. The Save As window appears. Save it in My Folders or you'll likely get an error.
 - i. On the Folders section, select "My Folders."
 - ii. On the Save in section, enter a name in the Name field.
 - iii. As an option, add a description of the report in the **Description** field.
 - iv. Select **OK**.



Step 3: Add or edit data elements, update filters, or update the display in the saved report

The updated Analysis Editor page displays with the name you gave to the report.

- 1. On the Criteria tab, you can choose to add or update the data on the report as desired.
 - a. You can add new data elements from the Subject Area section to the Selected Columns section.
 - b. You can also filter the data values already in the report in the Filters section.
 - c. You can create new filters from columns in the Selected Columns section.
 - d. After you update the data, select the **Results** tab to verify you have the desired data.
 - e. Make sure to save any desired changes using the **Save As** icon at the top right of the tab.
 - f. For more information, refer to the <u>Update the Data on an Existing Report</u> Quick Reference Guide.

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- 2. On the **Results** tab, you can update the view of the report.
 - a. You reformat the columns, put them in in a desired order, and remove them from view using the **Edit View** icon in the Table section.
 - b. You can create different views of the data such as a graph or a pivot table from the **Views** section in the left menu.
 - c. Review the **Results** tab often to verify that you have the desired view.
 - d. Make sure to save any desired changes using the Save As icon at the top right of the tab.
 - e. For information, refer to the <u>Update the View on an Existing Report</u> Quick Reference Guide.

All_Expenditures_Summary_7.2	26.2	24					Home	Catalog Fa	vorites 🔻	Dashboar	ds 👻 New 👻 Open	•		
Criteria Results Prompts Advanced														5
▶ Subject Areas ୍ ְ†ֶן ע ≫		l -	•	6 9 Ib ▼ 2 % E	1892 [.)	1 B 7 B 4	<i></i>							
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		Budget Period 2	2025	Agency G10									[A] 1022 🖉	
		Fund		Appropriation (CF3)		Department - Financials	5	Fact All Expenditures	Departmer Exp	nt Tree -	Appropriation (CF3)			
		Fund		Appropriation		Fin Department		Monetary Amt	Approp Dept Id	Altmt Dept Id	Bdgt Program	Bdgt Activity		
		1000 - General		G100001 - Accounting Services		G1031100 - Payroll Servi	ices	14,734.86	G1010000	G1021100	G1001 - Statewide Services	G100101 - Accounting	g Services	
		1000 - General		G100001 - Accounting Services		G1031200 - Statewide A	counting	34,359.42	G1010000	G1021200	G1001 - Statewide Services	G100101 - Accounting	g Services	

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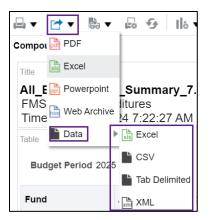
Step 4: Review available icons and take actions on the saved report

1. On the top of the **Compound Layout** section of the Results tab, there are icons that allows you to take actions on the saved report.

All_Expenditures_Summary_7.2	26.24	Home Catalog Favorites
Criteria Results Prompts Advanced		
▶ Subject Areas		3 46 B 🔤 🖾 🖶 🖽 🗹
> Catalog 🔹 🖒 🎸 😏	Compound Layout	
► Views → Us ▼ / ···· >>	Title	

- a. **Print this analysis:** This icon looks like a printer. It allows you to print the report in "Printable PDF" or "Printable HTML" format.
- b. **Export this analysis**: This icon looks like a box with an arrow pointing to the right. It allows you to export the data and save the report to your computer in the following file types: PDF, Excel, PowerPoint, Web Archive, or Data.
 - i. Data export options include Excel, CSV, Tab Delimited, and XML. ii.
 - ii. If you select Excel, your report will include subtotals.
 - iii. If you select Data, your report will include raw data with no subtitles.
- c. Show how the results will look on a dashboard: This icon looks like a piece of paper with eyeglasses. It will show how the report appears when displayed in a dashboard. It opens in a separate window.
- d. **Print & export options:** This icon looks like printer with paper. It allows you to set page settings on your printer for printing the report.
- e. **Refresh the results of the current analysis**: This icon looks like two arrows in a circle. It allows you to refresh the data in the current analysis.
- f. **New view**: This icon looks like a piece of paper with a plus sign. It allows you to show the results in other views such as a table, a pivot table, or a graph.
- g. There are other icons for more advanced users to review. Hover above an icon to see its function.
- 2. As desired, export your report.
 - a. Select the **Export this analysis** icon. A drop-down menu appears with the export options.





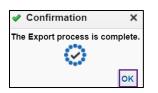
b. If you select PDF, Excel, PowerPoint, or Web Archive, you will get the data in a report with formatting such as the report title and run time. Here's an example of the Excel report.

All_Expenditures_Summary_7.26.24]						
FMS - All - Expenditures	•						
Time run: 7/26/2024 8:32:10 AM							
	-						
Budget Period	2025	Agency	G10				
Fund	Appropriation (CF3)	Department - Financials	Fact All	Department Tree - Exp		Appropriation (CF3)	
			Expenditures				
Fund	Appropriation	Fin Department	Monetary Amt	Approp Dept	Altmt Dept	Bdgt Program	Bdgt Activity
1000 - General	come and general	CONTRACT NAMES IN CONTRACT OF	14,734.86				
1000 - General			34,359.42				

c. If you select "Data" and then select an option, you will get the raw data without any formatting. Here's an example of the Excel data.

		А	В	С	D	Е	F	G	н	I.	J	К	L	М	N
1	E	Budget Per	Agency	Appropriat	Altmt Dept	Approp De	Allotment	Fund	Fund Cd	Appropriat	Appropriat	Bdgt Activi	Bdgt Progr	Fin Depart	Fin Depart
2	2	2025	G10					1000 - Ger	1000						
3	2	2025	G10					1000 - Ger	1000						

3. When the export process is complete, a confirmation window appears. Select OK.



4. The downloaded report appears on your desktop depending on where you get your downloads. For example, it might be on your browser. Select the **Downloads** icon, select the file and save it to your desktop as needed.

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All_Expenditures_Summary_7.26.24 Home Catalog	Favorites	All_Expenditures_Summary_7.	26.24.xlsx]

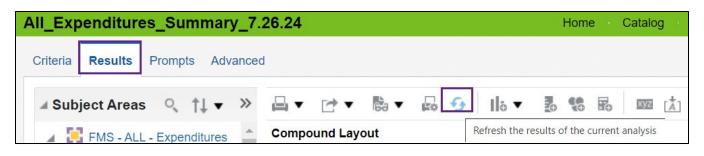
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Step 5: Use the Catalog to find, revise, and refresh the report

- 1. Once you save a report in the EPM Data Warehouse, you can find it in the Catalog in the global header. Select **Catalog**.
 - a. **My Folders** typically defaults. You can also open Shared folders if you have permissions to save reports in shared folders.
 - b. All your reports in My Folders appear on the right side of the page.
 - i. Find the desired report on this section.
 - ii. **HINT:** If you select **Sort by Last Modified Descending**, you can find the reports in order that you most recently worked on.
 - c. Select the **Edi**t link under your report. **NOTE:** If you select the **Open** link, the report will open but you can't edit it.

Catalog		Home Catalog Favorites •
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Folders	Туре АІІ	▼ Sort Last Modified Descending ▼ □ Show More Details
My Folders Shared Folders	All_Expenditures_Summary_7.26.24 Last Modified 7/26/2024 7:32:41 AM All Expenditures for Fund Code 1000. Open Edit More ▼	

- 2. The EPM Data Warehouse opens the desired report in the Analysis Editor page.
 - a. Typically, the report will appear with the most recent data from the last download. Open the **Results** tab to see the report.
 - i. If you're concerned about the most recent data, select the **Refresh** icon.
 - ii. Be sure to choose the icon above the Compound Layout and not from the Subject Areas. This action reruns your saved report with updated data.



As an option, you can further edit the data or display of your report in the Analysis Editor page.
 When finished with edits, save the report either as a new report with a new title or an updated report.